**CALIFORNIA CURRICULUM COLLABORATIVE**

# The Hexagon Tool:[1]

## An Adaptation to Support Instructional Materials Adoption and Implementation

**NOVEMBER 2023**

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# Overview

Selecting instructional materials is one of the most important decisions a district will make, and charting a strong implementation plan is crucial to maximizing those high-quality instructional materials. We believe that it is important for systems leaders to always have an eye toward implementation planning, even as they are going through their adoption process. To support districts in this work, we conducted extensive secondary research to find a tool that would support districts in this reflection and planning work and identified the Hexagon Discussion and Analysis Tool.[2] This tool could be used both during a team's adoption process, looking ahead toward implementation planning, or during implementation, to assess progress and areas for improvement.

The Hexagon Discussion and Analysis Tool was developed by the National Implementation Research Network (NIRN). The goal of this tool is to help organizations evaluate the contextual fit and feasibility of implementing programs or practices in a given context and is designed around six key indicators related to implementation. As is explained in greater detail in our Methodology section in the Appendix, the original tool has been adapted for this project with a specific focus on instructional materials adoption and implementation.

**System indicators** ask teams to consider the extent to which their district or charter system deeply understands their **Needs**; how the instructional materials **Fit** with their system; and the **Capacity** of their system to implement the materials successfully.

**Instructional materials** indicators assess the instructional materials under consideration along the following domains: **Evidence**, **Usability**, and **Supports**.
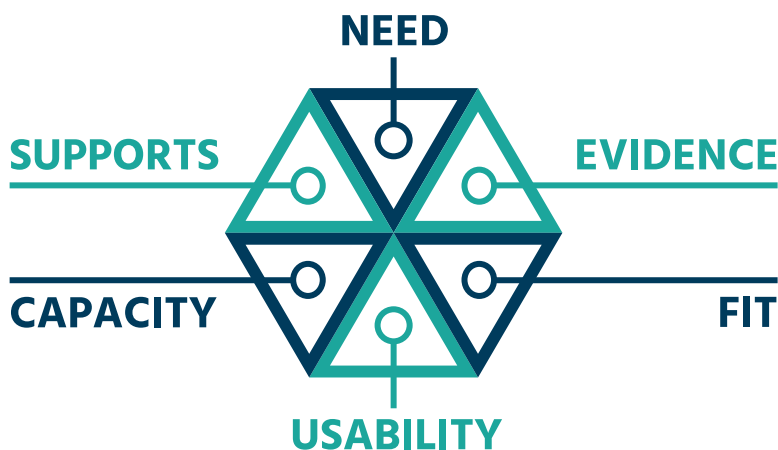


This framework is not just about assessing a set of instructional materials in isolation, but about contextualizing the instructional materials within the adoption and implementation processes of the district or charter system.

This tool is designed to be used by a team to facilitate discussion and ensure diverse perspectives are represented in a discussion of the six contextual indicators.

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[2] Adapted from: Metz, A. & Louison, L. (2019) The Hexagon Tool: Exploring Context. Chapel Hill, NC: National Implementation Research Network, Frank Porter Graham Child Development Institute, University of North Carolina at Chapel Hill. Based on Kiser, Zabel, Zachik, & Smith (2007) and Blase, Kiser & Van Dyke (2013). https://implementation.fpg.unc.edu/resource/the-hexagon-an-exploration-tool/

# Guidance for Use

## When to Use

The Hexagon Tool can be used during a district or charter's adoption or implementation timeline to determine the fit of the instructional materials with the local context. We at CalCurriculum[3] believe a strong materials adoption process includes, according to EdReports' Key Adoption Steps: 1) establish a process; 2) develop a local lens; 3) know and winnow your choices; 4) investigate the materials; 5) make a decision; and 6) plan for implementation.

Based on these key steps, if the tool is being used during an instructional materials adoption, it is recommended that the system team leading the adoption process (e.g., the Adoption Committee) uses this tool during the fourth step of "Investigate the materials" or the fifth step of "Make a decision" to consider final options with the lens of what it would look like to implement in their context. For systems considering piloting or field testing materials, this tool can be used for consideration both before final piloting choices are made and after pilot data is gathered. If the tool is being used at a later stage in instructional materials implementation, the discussions and takeaways can help diagnose implementation challenges related to contextual fit.

## How to Use

**PRIOR TO USE**

1. Develop a shared understanding of the broad need to be addressed, the focus population, and the instructional materials in consideration.

2. Review the discussion questions prior to meeting to ensure any data or resources that need to be reviewed for this discussion are available.

3. Identify a team to participate in the discussion. Suggested team members include school staff, coaches, school administrators, district or charter leaders, and representatives from the focus population and community. If being used during the adoption process, this may be the system Adoption Committee; if being used during implementation, this may be the system Implementation Team.

4. Identify a facilitator to objectively guide the team through the Hexagon Tool discussion process. This could be an external leader or someone on the internal team. If internal, one option to consider is using co-facilitators to ensure objectivity.

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[3] The California Curriculum Collaborative (CalCurriculum) is a partnership between EdReports and UnboundEd/CORE Learning. CalCurriculum helps districts adopt and implement great instructional materials by providing independent reviews, content-specific resources, and adoption and implementation guidance tailored to the California context.

**DURING USE**

5. The team reviews and discusses the questions for each indicator and documents relevant considerations.

6. After discussing each component, the team discusses and aligns on a rating based on their discussions using the 5-point Likert scale ratings descriptions in each section.

7. Using the discussion notes and ratings, the team makes recommendations for adoption decisions or implementation plan considerations. **Remember, this process is not all about the end ratings; it's about sparking conversations to gain insights into your team's perspectives.** If the team encounters disagreements about ratings or aligns on a lower score, they might ask questions like, "What are we hearing here from our team?" or "What does this tell us we need to pay attention to or take into consideration?" Each question and the discussions that emerge from them will help teams see new perspectives relating to the materials and consider whether there are adjustments that can be made for these materials to be implemented successfully at your site.

**EQUITY CONSIDERATIONS**

Assessment of contextual fit and feasibility is inextricably linked to considerations of diversity, equity, and inclusion (DEI). Disparate outcomes and community context cannot be accurately understood without acknowledging structural racism, marginalization, and oppression. Using the Hexagon Tool with a race equity lens can prompt teams to consider potential impacts of the program or practice on the focus population and whether or not implementation of the program or practice could advance equitable outcomes for all individuals and families.

# System Indicator: Need

*Whenever the use of instructional materials is in consideration, whether adopting or implementing, it's important as a system to begin with deeply investigating and understanding the needs of key stakeholders. In EdReports' Key Adoption Steps, this is done through Step 2: Develop a Local Lens. Note that as a System Indicator, this section explores the extent to which the district or charter system has deeply investigated and understood their needs, but not specifically whether the instructional materials in consideration have met those needs.*

1. Who is the identified focus population (e.g., 6th-8th graders)? Are there priority subpopulations (e.g., English Language Learners)? How were the priority subgroups identified? Language Note: Going forward in this tool, "focus population" will refer to the focus population identified by the implementing site team here for the purpose of this adoption.

2. What sets of core instructional materials are currently in use in classrooms? How is the implementation of the current program going?

   a. What could the current implementation data (e.g., observation data, usage data, etc.) plus the achievement data be demonstrating about how the current program is impacting the focus population?

3. What are the identified assets of the focus population(s)? What are the values of the focus population and community? How were these assets and values identified?

4. What is/are the identified needs of the focus population(s) in relation to instructional materials, and what are the root causes of these needs? How were those needs identified?

5. Was an analysis of quantitative or qualitative data conducted to identify specific area(s) of need relevant to the focus content area? If yes, what data were analyzed? Were these data disaggregated by race, ethnicity, language, and other characteristics specific to the focus population and subpopulation(s)? (Sample Resource to support this: CalCurriculum Data Discovery Tool)

6. How were school stakeholders (students, school staff, and families) engaged to assess their needs in relation to instructional materials? What do they believe will be helpful?

7. If the instructional materials are implemented, what could potentially change for students and teachers? How might these changes vary among priority subpopulations? Would these instructional materials help achieve the instructional vision set by the Local Education Agency (LEA)[4]?

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[4] Throughout the tool, "LEA" refers to the school district or charter network engaging in use of the tool.

**Ratings**

*When scoring in the Need section, the focus of this rating is on to what extent the system team has deeply investigated their data and the needs of key stakeholders to understand the priorities for the district or charter context.*

**5 - Strong Understanding of Need**

The Local Education Agency (LEA)[5] has demonstrated a comprehensive understanding of the needs of the focus population in relation to instructional materials. The LEA has included three or more data sources when conducting the needs assessment, including student achievement data and perspectives of staff, students, and families, and has disaggregated data to identify needs of specific and relevant subpopulations.

**4 - Adequate Understanding of Need**

The LEA has demonstrated an understanding of the needs of the focus population in relation to instructional materials. The LEA has included two or more data sources when conducting the needs assessment, including student achievement data and perspectives of staff, students, and families, and has disaggregated data to identify needs of specific and relevant subpopulations.

**3 - Some Understanding of Need**

The LEA has demonstrated some understanding of the needs of the focus population in relation to instructional materials. The LEA has included two or more data sources when conducting the needs assessment, including student achievement data, but has done limited stakeholder needs assessment and/or has not disaggregated these data.

**2 - Minimal Understanding of Need**

The LEA has demonstrated minimal understanding of the needs of the focus population in relation to instructional materials. The LEA has included only student achievement data when conducting the needs assessment and has not disaggregated these data.

**1 - No Understanding of Need**

The LEA has not demonstrated an understanding of the needs of the focus population in relation to instructional materials.

**Additional Questions and Notes**

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[5] Throughout the tool, "LEA" refers to the school district or charter network engaging in use of the tool. If a school staff member is answering questions as a member of a larger LEA, they should speak to their own school experience, and the LEA as a whole to the best of their ability. Larger LEAs should answer to the majority of school experiences, or the LEA on average, to the best of their ability.

# Instructional Materials Indicator: Evidence

*Whenever adopting or implementing instructional materials, it is important to understand the quality of the instructional materials you are considering or already using. In EdReports' Key Adoption Steps, this is done through Step 4: Investigate the Materials.*

1. Has EdReports reviewed this set of instructional materials? Has it received a "Green/Meets Expectations" on the first two gateways for alignment? If it has been reviewed, provide details of the report scores in the notes section.

2. Is there evidence available (e.g., external evaluation criteria; internal rubric) to demonstrate the ability of this set of instructional materials to support the needs of priority subgroups? (Sample Resources to evaluate this: English Learner Success Forum Guidelines for Instructional Materials or the Criteria for Review of Instructional Materials' Success in Addressing MLL Linguistic and Instructional Needs)

3. Are there any additional reports or sources of evidence that demonstrate the effectiveness of this set of instructional materials (e.g., demonstrated impact on student learning outcomes)?

   a. Are there any available case studies or research reports from independent researchers? (Note: What Works Clearinghouse summarizes research findings but does not examine standards alignment; both are important to consider.)

   b. Are there any neighboring LEAs utilizing this set of instructional materials? If so, have there been any observations of the instructional materials in use? Do they have any evidence and/or feedback in regards to their implementation experience?

4. If the tool is being used after piloting: What data was collected from pilot classrooms and stakeholders? Is there data to demonstrate the alignment of these materials with the implementing site's instructional vision and the needs of the focus population and any priority subpopulations (e.g., teacher feedback surveys; classroom observations; student empathy interviews)?

5. If the tool is being used during implementation: What has the data signaled to date as to the impact of this implementation (such as student achievement data, student work data, or implementation fidelity as measured by classroom observations, common planning time routines, etc.)? Was this data disaggregated by race, ethnicity, language, and other characteristics specific to the focus population and subpopulation(s)?

**Ratings**

*When scoring in the Evidence section, the focus of this rating is on to what extent the instructional materials have evidence of standards alignment and evidence of supports for priority subgroups.*

**5 - High Evidence**

The instructional materials have **demonstrated strong evidence of alignment based on external review** (e.g., EdReports "Meets Expectations" score on the first two gateways or objective third-party research reports) and **meet most criteria for supporting priority subgroups** based on review rubrics or other sources of data.

**4 - Evidence**

The instructional materials have demonstrated **strong evidence of alignment based on external review** (e.g., EdReports "Meets Expectations" score on the first two gateways or objective third-party research reports) and **meet some criteria for supporting priority subgroups** based on review rubrics or other sources of data.

**3 - Some Evidence**

The instructional materials show **some evidence of alignment based on external review** (e.g., EdReports "Meets Expectations" score on the first two gateways or objective third-party research reports) and **meet limited criteria for supporting priority subgroups** based on review rubrics or other sources of data **or were not reviewed for supporting priority subgroups.**

**2 - Minimal Evidence**

The instructional materials show **minimal evidence of alignment based on external review** (e.g., EdReports score of "Partially Meets" on the first or second gateway or objective third-party research reports) and **meet limited criteria for supporting priority subgroups** based on review rubrics or other sources of data **or were not reviewed for supporting priority subgroups.**

**1 - No Evidence**

The instructional materials **do not have any evidence of alignment** (e.g., received an EdReports score of "Does Not Meet" in the first gateway for alignment).

**Additional Questions and Notes**

# System Indicator: Fit

*Whether adopting or implementing, it is important that a system take into consideration how the instructional materials fit with the LEA's instructional vision, prior pedagogical practices, other initiatives, and the assets, values, and needs of the focus population. If this tool is being used during adoption and the LEA is trying to shift pedagogical practices, this is an important factor to take into consideration after Step 4: Investigate the Materials.*

1. How do the instructional materials fit with the instructional vision and pedagogical approach of the LEA?

    a. How big of a shift will it be for staff to transition to the pedagogical approach of this set of instructional materials, in comparison with current practices?

    b. How might staff mindsets and expectations of students need to shift?

2. What other initiatives currently being implemented will intersect with the implementation of these instructional materials (e.g., supplementary instructional materials; intervention or tutoring programs; technologies in use)?

    a. Will the other initiatives support, hinder, or affect in any way the implementation of the instructional materials in order to achieve the desired outcomes?

3. Has there already been stakeholder engagement that has facilitated buy-in to these instructional materials, or the desire to make these changes? What steps might need to be taken to facilitate any needed mindset shifts for staff? Please explain.

    a. If not yet, is there a strong plan to facilitate buy-in for key stakeholders? Please describe.

4. Are the instructional materials culturally and linguistically responsive to the focus population's assets, values, and needs? (This can be assessed in further detail with a rubric like the [NYU Steinhardt Culturally Responsive-Sustaining STEAM Curriculum Scorecard.](#))

**Ratings**

*When scoring in the Fit section, the focus of this rating is on the extent to which the instructional materials fit with the current system. A lower score in this section does not mean that the instructional materials cannot be a strong fit; it simply indicates multiple inputs need to be considered before launching, if adopting, or some changes may be needed, if currently implementing, to create a strong fit.*

**5 - Strong Fit**

The instructional materials **align strongly with the instructional vision, and stakeholders are bought in or there is a strong plan for stakeholder buy-in.** The materials are a good fit with other existing initiatives and are culturally and linguistically responsive to the impacted community.

**4 - Good Fit**

The instructional materials align with the instructional vision but **will require a shift from current instructional practices. A majority of stakeholders are bought in, or there is a solid plan for stakeholder buy-in.** The materials are a good fit with other existing initiatives and are culturally and linguistically responsive to the impacted community.

**3 - Some Fit**

The instructional materials align with future instructional vision but will require a shift from current instructional practices. The instructional materials **fit with two other priorities of the implementing site,** including stakeholder buy-in, other initiatives, and responsiveness to the target population.

**2 - Minimal Fit**

The instructional materials **fit with only one or two of the priorities of the LEA,** including instructional vision, stakeholder buy-in, other initiatives, and responsiveness to the target population.

**1 - Does Not Fit**

The instructional materials **do not fit with the priorities of the LEA** or the assets, values, or needs of the impacted community.

**Additional Questions and Notes**

# Instructional Materials Indicator: Usability

*Whether adopting or implementing instructional materials, it is important to consider the usability of the instructional materials for key stakeholders. If leading a pilot or a field test, these are important questions to consider. In EdReports' Key Adoption Steps, this is done during Step 4: Investigate the Materials.*

1. Is each core feature well operationalized (e.g., staff know what to do and say, how to prepare, how to assess progress)? Are the materials easy to navigate and understand for teachers?

   a. Are the materials easily usable by new teachers, if staff are less experienced?

2. What is teacher feedback on the usability of these materials to prepare and implement in the classroom? (Pending availability, what is the EdReports Usability score?)

3. Are the core features that are required for the materials to be effective (e.g., a design structure such as Try-Discuss-Connect) clearly identified?

4. Is there vertical alignment in the pedagogical approach of the instructional materials that enables usability across grades within the focus population (e.g., within K-5)?

   a. Is there vertical alignment with the pedagogical approach of the instructional materials in the grades or courses before or after that of the focus population (e.g., if adopting for 6-8, consider what K-5 and 9-12 are using)?

5. Is there guidance in the materials on how to modify or adapt core features of the materials in order to meet the needs of priority subgroups without compromising the expectations of the standards?

**Ratings**

*When scoring in the Usability section, the focus of this rating is on the usability of the instructional materials, meaning how easy they are for staff to access, understand, and utilize.*

**5 - Highly Usable**

The instructional materials have identified and operationalized core components that are easy to access, understand, and utilize **for staff at any experience level.** There is **strong vertical alignment within and beyond the focus population,** and there is guidance on how to modify or adapt key components while maintaining the expectations of the standards.

**4 - Usable**

The instructional materials have identified and operationalized core components that **most staff are able to access, understand, and utilize.** There is strong vertical alignment within the focus population, and there is guidance on how to modify or adapt key components while maintaining the expectations of the standards.

**3 - Somewhat Usable**

The instructional materials have identified and operationalized core components that most staff are able to access, understand, and utilize. There is **some vertical alignment,** but there is **unclear or no guidance on how to modify or adapt** key components while maintaining the expectations of the standards.

**2 - Minimally Usable**

The instructional materials have identified core components; however, there is l**imited vertical alignment, and** there is **unclear or no guidance on how to modify or adapt** key components while maintaining the expectations of the standards.

**1 - Not Usable**

The instructional materials do not identify core components and **are not usable in the focus context.**


**Additional Questions and Notes**

# System Indicator: Capacity

*To plan for a strong implementation launch or support the success of an ongoing implementation, strong capacity across the system is critical. This indicator assesses four types of capacity across the LEA: staff capacity, financial capacity, administrative capacity, and systems capacity.*

**1. Staff Capacity:** What is the current structure of teacher collaboration time (e.g., Professional Learning Communities) for school staff? What systems or structures related to collaboration time will be needed to implement the instructional materials (e.g., materials internalization, data analysis, planning, etc.)?

**2. Staff Capacity:** Do these materials require different pedagogical or content knowledge of staff than what currently exists across school sites? If so, what would be needed to build staff capacity?

**3. Financial Capacity:** Are there sufficient budgetary resources to support the cost of implementing these materials over the next few years? If the current budget cannot support implementation, outline a resource development strategy.

   a. Are there start-up costs for implementation (e.g., fees to the publisher, materials purchase)? Typically, how much would it cost to implement each year (e.g., initial training and ongoing professional learning, platform subscription fees, etc.)?

   b. Do current fiscal policies of the LEA align with the needs for purchasing materials (e.g., publisher purchasing timelines)?

**4. Administrative Capacity:** Are system-level leaders and site instructional leaders on board with prioritizing the implementation of these instructional materials? Do any administrative policies or procedures need to be adjusted to support teacher implementation?

**5. Administrative Capacity:** Are coaching and support from school and district leaders available for implementing the instructional materials? What planning, instructional, or coaching practices must be developed or refined to support the use of this set of instructional materials?

**6. Administrative Capacity:** Will current communication systems support strong communication with implementing staff and the community in relation to implementation? If not, what adjustments should be made to ensure effective communication?

**7. Systems Capacity:** What are the daily/weekly instructional minutes requirements to teach this set of instructional materials? How does this align with the current daily/weekly instructional minutes allocated in the schedule?

**8. Systems Capacity:** How do these instructional materials align with current technology (including learning management systems and other platforms) and data security requirements? Do the instructional materials require any new technology (hardware or software)? Include costs, if known, in the notes section.

**Ratings**

*When scoring in the Capacity section, the focus of this rating is on the extent to which the LEA has all the types of capacity needed to implement successfully: staff capacity, financial capacity, administrative capacity, and systems capacity.*

**5 - Strong Capacity**

The implementing site has **all** of the capacity necessary, including **all of the following:** staff capacity, financial capacity, administrative capacity, and systems capacity required to implement and sustain the instructional materials over time.

**4 - Adequate Capacity**

The implementing site has **most** of the capacity necessary, including **three of the following:** staff capacity, financial capacity, administrative capacity, and systems capacity required to implement and sustain the instructional materials over time.

**3 - Some Capacity**

The implementing site has **some** of the capacity necessary, including **two of the following:** staff capacity, financial capacity, administrative capacity, and systems capacity required to implement and sustain the program or practice over time.

**2 - Minimal Capacity**

The implementing site has **minimal** capacity necessary, including only **one of the following:** staff capacity, financial capacity, administrative capacity, and systems capacity required to implement and sustain the instructional materials over time.

**1 - No Capacity**

The implementing site **does not have the capacity** necessary, including any of the following: staff capacity, financial capacity, administrative capacity, and systems capacity required to implement.

**Additional Questions and Notes**

# Instructional Materials Indicator: Supports

*Whether adopting or implementing instructional materials, it is important to consider the supports available within the materials and from external providers, such as the publisher, to support a strong implementation across all levels of the system.*

1. Is there a grade-band or content-specific outside "expert" (e.g., from the publisher; outside consultant) who can help with implementation over time? Does the outside "expert" provide any coaching services? If yes, list names and/or organization, as well as associated costs, in the notes section.

2. Is publisher training and professional development on the instructional materials readily available for teachers and leaders? Include the source and cost in the notes section.

   a. How can site leaders help ensure that training or professional development uses adult learning best practices and is culturally sensitive and addresses issues of race equity?

3. Is there training available from the publisher for any required platforms or data systems? Is there initial or ongoing external technology support? If so, identify potential services as well as associated costs in the notes section.

4. If the materials require additional pedagogical or content knowledge to implement, is there guidance within the materials to assist teachers with planning and teaching lessons (e.g., side bar explanations, videos, etc.)? If yes, detail in the notes section.

5. Is there guidance within the materials for teachers on how to teach the lessons, routines, or concepts to support access for specific student populations (e.g., English Learners, students with disabilities)? If yes, detail in the notes section.

7. Is there guidance or resources within the materials to support partnering with families and caregivers (e.g., videos, letters, practice materials)? If yes, detail in the notes section.

8. Are all the required materials and technology for staff and students readily available and accessible by the implementation start date?

**Ratings**

*When scoring in the Supports section, the focus of this rating is on the extent to which there are strong supports within the materials or from an outside provider to support a successful implementation.*

**5 - Strongly Supported**

Comprehensive resources are currently available from an outside provider or in the materials to support implementation, including **all of the following:** external training or coaching, materials to support strong staff implementation, materials to support implementation with priority student subpopulations, materials to support partnering with families, and readily available materials.

**4 - Well Supported**

Many resources are currently available from an outside provider or in the materials to support implementation, including **four of the following:** external training or coaching, materials to support strong staff implementation, materials to support implementation with priority student subpopulations, materials to support partnering with families, and readily available materials.

**3 - Somewhat Supported**

Some resources are currently available from an outside provider or in the materials to support implementation, including **two or three of the following:** external training or coaching, materials to support strong staff implementation, materials to support implementation with priority student subpopulations, materials to support partnering with families, and readily available materials.

**2 - Minimally Supported**

Limited support resources are currently available beyond the instructional materials themselves or a one-time training.

**1 - Not Supported**

There are no resources currently available to support implementation.

**Additional Questions and Notes**

# The Hexagon: An Exploration Tool

**Summary Table for Use During Instructional Materials Adoption**

LEAs can use the table below to compare scores across sets of instructional materials in consideration, either to inform decision-making around which materials to move to pilot/field test or after piloting/field testing to consider final adoption decisions. For each set of instructional materials in consideration, jot down scores across indicators in the relevant column. In EdReports' Key Adoption Steps, this is done at the end of Step 4: Investigate the Materials to inform Step 5: Make a Decision and plan ahead for Step 6: Implement.

| Facilitator: | Today's Date: |
|---|---|
| Individuals Participating: | Identified Need: |
| | Focus Population(s): |

|  | Instructional Materials Title 1: | Instructional Materials Title 2: | Instructional Materials Title 3: |
|---|---|---|---|
| **Need** | | | |
| **Evidence** | | | |
| **Fit** | | | |
| **Usability** | | | |
| **Capacity** | | | |
| **Supports** | | | |

# The Hexagon: An Exploration Tool

**Summary Table for Use During Instructional Materials Implementation**

LEAs can use this tool during instructional materials implementation to help diagnose implementation challenges related to contextual fit. Teams can use the table below to compare scores across indicators and then consider which areas to prioritize making changes or improvements based on scores and discussions. Use the "Notes" column to jot down any headlines from the team's discussion relating to why the score was selected, and use "Next Steps" to note any next steps for the team related to implementation planning and continual improvement.

| | |
|---|---|
| **Facilitator:** | **Today's Date:** |
| **Individuals Participating:** | **Identified Need:** |
| | **Focus Population(s):** |

**Instructional Materials Title:**

| | Scores | Notes | Next Steps |
|---|---|---|---|
| **Need** | | | |
| **Evidence** | | | |
| **Fit** | | | |
| **Usability** | | | |
| **Capacity** | | | |
| **Supports** | | | |

# Guidance on Best Practices in Instructional Materials Adoption

The materials you select and how you select them matters. The selection process is a critical lever for ensuring that quality materials are adopted and then used well in classrooms.

A strong materials adoption process begins with two key questions: What is your vision of instruction? What do you want students to experience in your classrooms? Here is what we at CalCurriculum[6] believe a strong materials adoption process includes, according to EdReports' Key Adoption Steps:

**1. Establish a process:** District leader(s) set guidelines for the adoption process (e.g., timeline, budget) and gather an adoption committee. As noted in the Hexagon Tool Guidance for Use, we believe this committee should include a diverse group of perspectives; suggested team members include school staff, coaches, school and LEA leaders, and representatives from the focus student population and community.

**2. Develop a local lens:** Examine your data and local context in order to establish priorities for considering new instructional materials (sample resource to guide this process: CalCurriculum Data Discovery Tool). You can use the insights gained from your stakeholder needs engagement and data analysis to identify priority subgroups and priorities for your adoption process.

**3. Know and winnow your choices:** Understand the market and work toward identifying a subset of programs that can be deeply investigated, using the priorities determined from your team's vision and data analysis (sample resource to help you winnow your choices: EdReports' educator-created reviews of K-12 instructional materials).

**4. Investigate the materials:** Engage in a thorough, hands-on study of the two to four high-quality programs you've selected. We suggest using additional external criteria (such as the Criteria for Review of Instructional Materials' Success in Addressing MLL Linguistic and Instructional Needs) or internal rubrics developed by experts on your team to analyze whether the materials meet the needs of your priority subpopulations. Consider utilizing a pilot or field test to test out the materials in your context. After you've deeply investigated the evidence of your materials, we recommend using the Hexagon Tool to analyze your final options in consideration.

**5. Make a decision:** Using evidence collected during the investigation, including the data and discussions from the Hexagon Tool, make a final decision (sample resource to guide decision-making processes: EdReports Making Your Decision). Then, develop a plan to communicate the decision and get materials in teachers' hands.

**6. Implement:** Using the insights gained from your Hexagon Tool discussion process, develop and execute a plan to prepare teachers and leaders to implement the materials. Check out CalCurriculum's Implementation Page for further guidance.

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# Conditions to Support Effective Instructional Materials Implementation

Charting a strong implementation plan is crucial to maximizing your new instructional materials. We know that to set up a strong and sustainable implementation, we must provide leaders and educators across a district ecosystem with the skills, knowledge, and tools to implement.

By setting up the right conditions for implementation, local educational agencies can engage in comprehensive, transformative implementation of newly adopted instructional materials. Here is what we at CalCurriculum[7] believe are the conditions for successful high-quality instructional materials implementation, according to CORE Learning:

**1. Implementation Team:** Assemble a cross-functional, diverse LEA Implementation Team to ensure leaders at the highest level are sponsoring the work and committed to making it a priority for the LEA. Consider the questions in "Fit" and "Capacity."

**2. Intentional Launch:** Set an instructional vision for the adopted materials and implementation expectations. Develop a strategy that outlines coherence and alignment with other initiatives, and design an implementation plan that prepares for change management and buy-in across key stakeholders. Consider the questions in "Need" and "Fit."

**3. Professional Learning:** Provide job-embedded professional learning tailored for teachers, instructional coaches, and school and district leaders on the adopted curriculum through a multiyear professional learning strategy. Plan for consistent walkthroughs to monitor curriculum implementation, and provide ongoing coaching and feedback to teachers and leaders. Consider the questions in "Need," "Fit," "Usability," "Capacity," and "Supports."

**4. Communication:** Communicate implementation decisions and rationales frequently and early. A strong communication strategy ensures transparency, feedback opportunities, and ongoing curriculum implementation updates for all stakeholders. Consider the questions in "Capacity."

**5. Impact:** Identify metrics, tools, and methods that will be used to measure the impact that curriculum implementation has on district leaders, school leaders, teachers, and student outcomes. Ongoing monitoring and measurement of progress toward curriculum implementation ensures LEAs meet their goals and engage in cycles of continuous improvement. Consider the questions in "Evidence" and "Capacity."

**6. Sustainability:** Prioritize sustainability from the beginning. Build and maintain tools and resources that will support managing the implementation and supporting all stakeholders. Consider the questions in "Capacity" and "Supports."

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[7] The California Curriculum Collaborative (CalCurriculum) is a partnership between EdReports and UnboundEd/CORE Learning. CalCurriculum helps districts adopt and implement great instructional materials by providing independent reviews, content-specific resources, and adoption and implementation guidance tailored to the California context.

# Summary of Recommended Resources

Here is a summary of all recommended resources throughout the Tool and Appendix, listed in alphabetical order:

[CalCurriculum Criteria for Review of Instructional Materials' Success in Addressing MLL Linguistic and Instructional Needs](#)

[CalCurriculum Data Discovery Tool](#)

[EdReports' Educator-Created Reviews](#)

[EdReports Making Your Decision](#)

[English Learner Success Forum Guidelines for Instructional Materials](#)

[NYU Steinhardt Culturally Responsive-Sustaining STEAM Curriculum Scorecard)](#)

# Methodology

At the outset of this project, we sought to develop a user-friendly way for districts[8] to self-assess what it would look like to implement a particular set of instructional materials when making final decisions for instructional materials adoption or planning for instructional materials implementation.

After conducting extensive secondary research, we found the Hexagon Discussion and Analysis Tool, which was developed by the National Implementation Research Network (NIRN).[9] The goal of this tool is to help organizations evaluate the contextual fit and feasibility of implementing programs or practices in a given context and is designed around six key indicators related to implementation. While the framework and design of the tool aligned well with the goals for our project, since the original Hexagon Tool is field-agnostic, we knew we would need to engage in a thoughtful and deliberative process to adapt the tool to have a specific focus on instructional materials adoption and implementation. Throughout our process, we worked closely with NIRN on this adaptation, including undergoing a full facilitation training on the original Hexagon Tool.

We began by interviewing several internal adoption and implementation experts at UnboundEd and CORE Learning about their own adoption and implementation experiences, including criteria that they observed to affect their most successful or challenging adoption and implementation experiences. After the interviews, we then coded the data, identified recurring themes across interviews, and developed key topics that were then used to complete the first version of our adapted Hexagon Tool.

We shared this initial adapted tool with our project Advisory Council, which includes nine adoption and implementation experts, and received helpful feedback on the tool's instructions, length, questions, and ratings descriptions. Following incorporation of this feedback, we shared an updated version of our adapted tool with our project Testing Group, made up of eleven leaders from the field, including current teachers, coaches, and district leaders from across California, as well as consultants who lead math adoption and implementation work across sites. We engaged in user testing with each of these Testing Group participants, walking through an adoption scenario based on their own experiences and gathering feedback on the tool structure, guidance, questions, and ratings descriptions.

Based on the feedback of our Testing Group, we created a final draft of our adapted tool, which we then shared back with our Advisory Council and a key group of internal stakeholders for final review and feedback. The tool presented to you today is the result of these many stages of stakeholder interviews and user testing.

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[8]  We use the term "district" in this methodology section to include all types of local education agencies, including both traditional school districts and charter networks.

[9]  Adapted from: Metz, A. & Louison, L. (2019) The Hexagon Tool: Exploring Context. Chapel Hill, NC: National Implementation Research Network, Frank Porter Graham Child Development Institute, University of North Carolina at Chapel Hill. Based on Kiser, Zabel, Zachik, & Smith (2007) and Blase, Kiser & Van Dyke (2013). https://implementation.fpg.unc.edu/resource/the-hexagon-an-exploration-tool/